

# RightNow Sales 8™ A First Look



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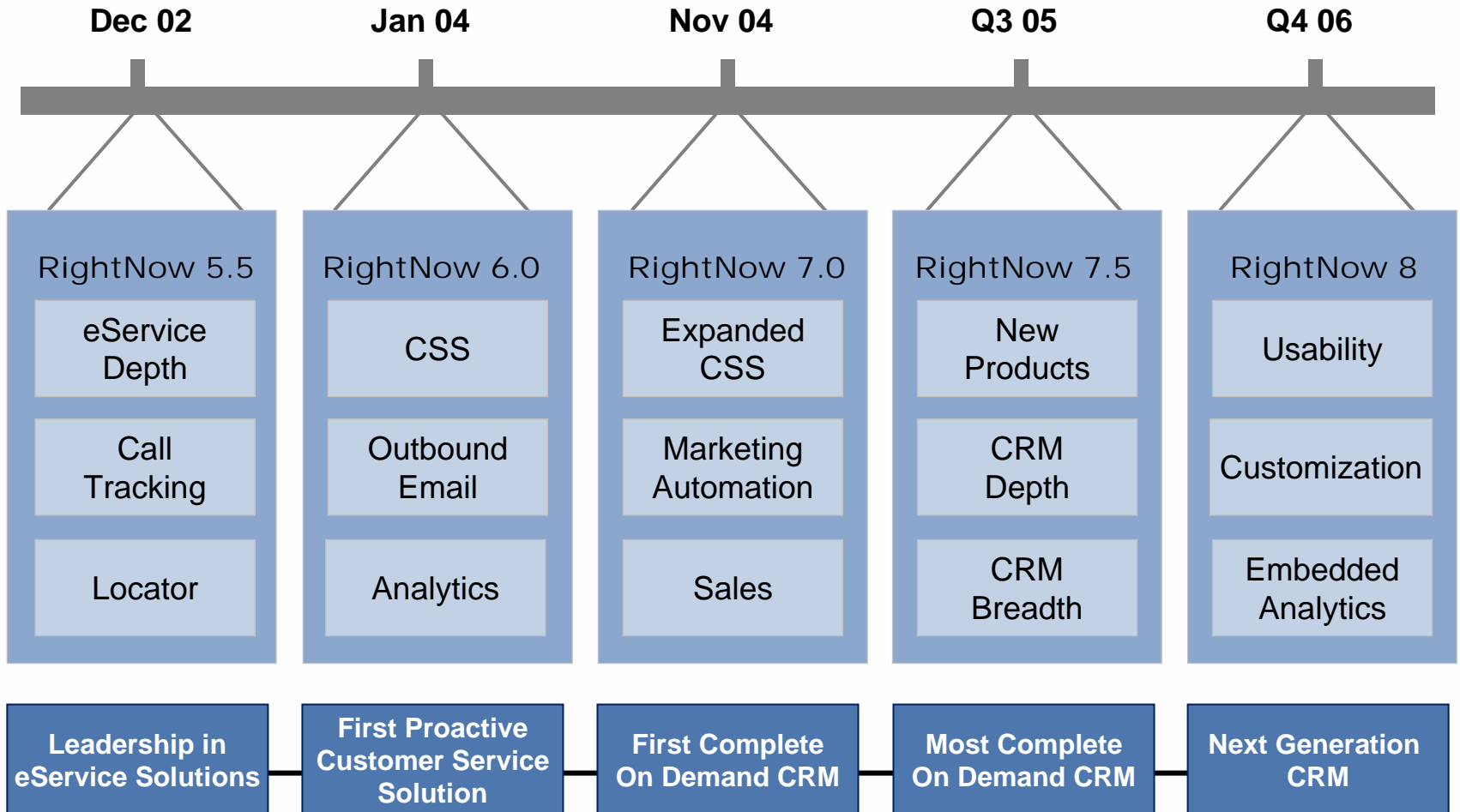
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**TECHNOLOGIES**

# Agenda

- RightNow 8™ Overview
  - Product Roadmap
  - Release Themes
- RightNow Sales 8™
  - What's New
  - Product Demo
- Questions

# Product Evolution



# High Performance Architecture

*Designed for mission-critical business environments ...*

- **New users get up to speed quickly**
  - Modeled on universally-familiar MS Office controls
  - Reduced training time
- **Easily customizable desktops**
  - Drag-and-drop fields
  - In-context menus and toolbars
- **Improved speed and performance**
  - Faster and highly responsive interface

# Improved Usability

*New user interface drives dramatic efficiency gains...*

- **Intuitive ease of use**

- One console across Service, Sales and Marketing activities
- Drag and drop tabs
- Consistent navigation controls
- Quick access to previously viewed records

- **Personalized business process management**

- Tailored workflows to handle specific business processes
- Easily sequence or customize business process flows

The screenshot displays the RightNow CRM interface. On the left is a navigation sidebar with tabs for Home, Calendar, Opportunities, Organizations, Contacts, Tasks, Incidents, Answers, Campaigns, Surveys, Outbound Email, Content Library, Audiences, and Analytics. The main area is divided into three sections: a calendar for July 2005, a 'My Opportunities' table, and a detailed 'Opportunity Name' form.

| Name                     | Organization Name         | Contact          | Stage                | Forecasted Value | Forecasted Close |
|--------------------------|---------------------------|------------------|----------------------|------------------|------------------|
| 1 Phase 2 expansion      | Centennial Homes          | Janice Trudy     | Demo                 | \$800,000        | 7/30/2004        |
| 2 Trouble Ticketing      | Centennial Homes          | Janice Trudy     | 2 Partner Recvd (5%) | \$475,000        | 7/30/2004        |
| 3 Business Upgrade       | Western Energy Alliance   | Scott Winder     | Evaluation (40%)     | \$650,000        | 6/30/2004        |
| 4 Subscription Renewal   | Simmes Construction       | Jack Helting     | 5 Recvd Order (100%) | \$850,000        | 6/30/2004        |
| 5 Q3 Integration Project | Delta Graphics and Signes | Trent Purdy      | 2 Qualified (5%)     | \$700,000        | 7/30/2004        |
| 6 Expansion Services     | Delta Graphics and Signes | Trent Purdy      | 5 Approved (85%)     | \$685,000        | 7/30/2004        |
| 7 ISP Initial            | Rip Communication         | Jim Wheeler      | 3 Pipeline (20%)     | \$190,000        | 7/23/2004        |
| 8 Installation           | Blue Electronics          | Kip Steeler      | Evaluation (40%)     | \$500,000        | 7/30/2004        |
| 9 LIAP Upgrade           | Kepling Design            | Cynthia Williams | Keep in rep pipeline | \$400,000        | 7/30/2004        |
| 10 Wireless installation | Madison Furniture         | Jared Thompson   | 4 Negotiating (60%)  | \$680,000        | 7/30/2004        |
| 11 Service Solution      | Madison Furniture         | Jared Thompson   | Verify Cash          | \$930,000        | 7/30/2004        |

The 'Opportunity Name' form includes tabs for Summary, Contacts, Custom Fields, Quotes, Tasks, Attachments, Notes, and Audit Log. The Summary tab is active, showing fields for Name, Organization, Status, Strategy, Stage, Manager Forecast, Rep Forecast, Forecast Close, Sales Rep, Territory, Initial Contact, Recall, Closed, Closed Value, and Summary.

# More Powerful Analytics

*Easily created and customized by the business user...*

- **Report Design Center**
  - Drag and drop report creation
  - Real-time preview
- **Customizable role-based dashboards, reports and homepages**
  - Over 500 pre-built reports and dashboards
- **Historical trending**
  - Only on demand vendor delivering this capability



# RightNow Sales 8™ New Features



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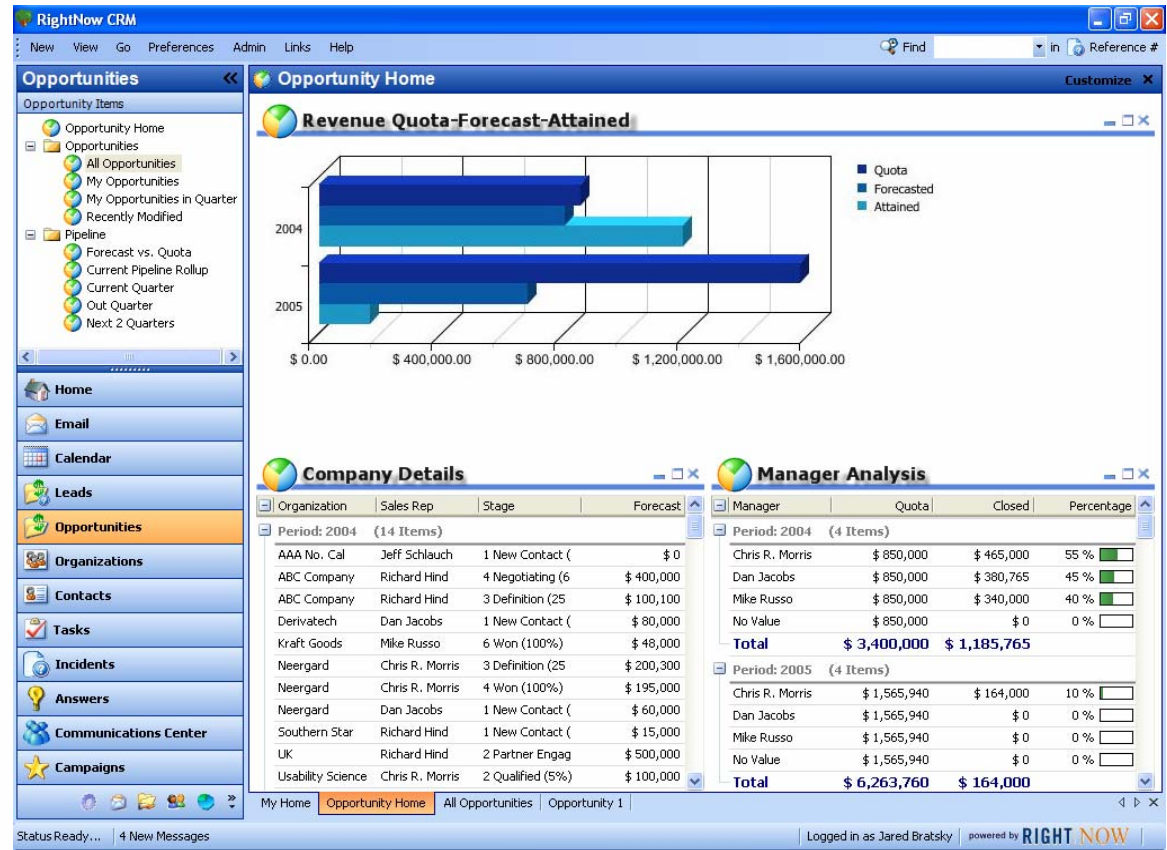
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**TECHNOLOGIES**

# New Feature Enhancements

- Redesigned user interface
- Highly configurable screen designer
- Enhanced lead management and routing



# New Feature Enhancements

- Graphical report design
- Role-based dashboards and reports
- Historical trending
- If-then-else business rules

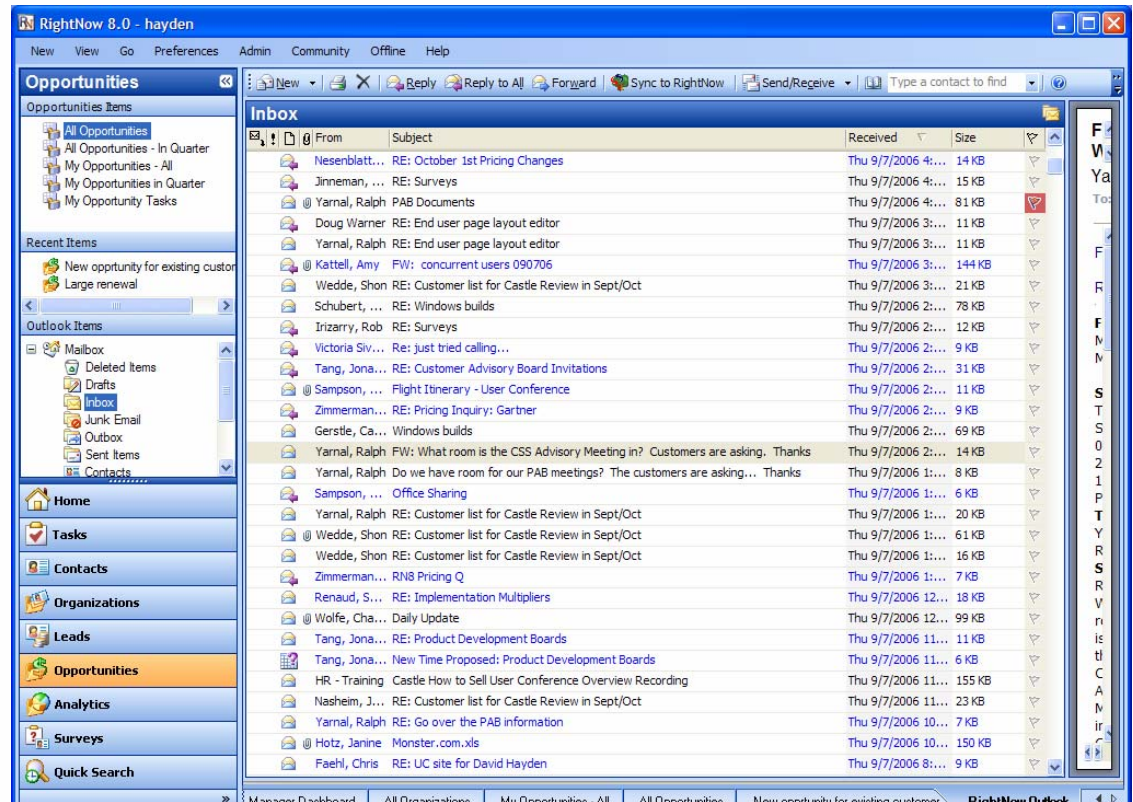
The image displays three overlapping screenshots of the RightNow 8.0 software interface, demonstrating various features:

- Top Screenshot:** Shows the 'All Organizations' list with columns for Organization Name, Num. Opps, and Action. The list includes organizations like Arianna Home Builders, Baobab, Barca Sp, Blaugar, Blue Not, Blue Ribb, Bolton M, Brandon, Brindell, Fiduciar, First Res, and Glasboo.
- Middle Screenshot:** Shows the 'New opportunity for existing customer' form. Fields include Opportunity Name (New opportunity for existing customer), Organization ID, Contact ID (Sarah McCullough), Assigned (Andrew Larson), and Date of Initial Contact.
- Bottom Screenshot:** Shows the 'Sales Manager Dashboard' with several reports:
  - Current Period - Closed and Forecasted Revenue:** A line chart showing Rep Closed Sales Total, Closed + Forecasted, and Rep Quota over time.
  - Top Deals:** A table listing deals with columns for Name, Revenue, Close Date, and Sales Stage.

| Name                        | Revenue       | Close Date | Sales Stage      |
|-----------------------------|---------------|------------|------------------|
| Referral from previous deal | \$ 120,000.00 | 05/31/2006 | Won              |
| Upselling opp               | \$ 91,000.00  |            | Qualified Opport |
| Phone replacement           | \$ 49,000.00  |            | Evaluation       |
| Harrysburg opportunity      | \$ 47,000.00  | 05/31/2006 | Won              |
| New Phones                  | \$ 41,000.00  |            | Qualified Opport |
| Phone upgrades              | \$ 34,000.00  |            | Lead             |
| Possible opportunity        | \$ 34,000.00  |            | Qualified Opport |
| Complex sale                | \$ 33,900.00  |            | Evaluation       |
  - Pipeline Funnel (Sales ScoreCard):** A funnel chart for Rich Newman Q3 2006, showing stages from Stage 1 (\$285 K) to Stage 6 (\$66.8 K).
  - Closed Revenue by Rep by Week:** A stacked area chart showing revenue for Blake Gingrich, Bob Groom, Bob MacLean, and BobRaths from 06/30/2006 to 09/11/2006.

# New Feature Enhancements

- Tightly coupled Outlook integration
- Same UI in disconnected user access mode
- Send quotes in PDF



# Product Demo



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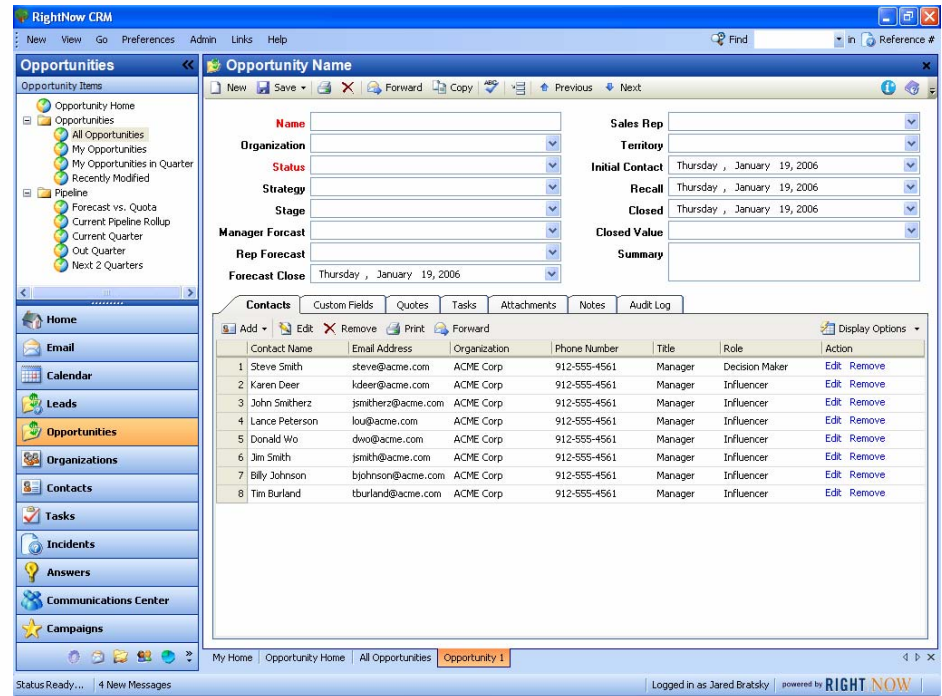
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**TECHNOLOGIES**

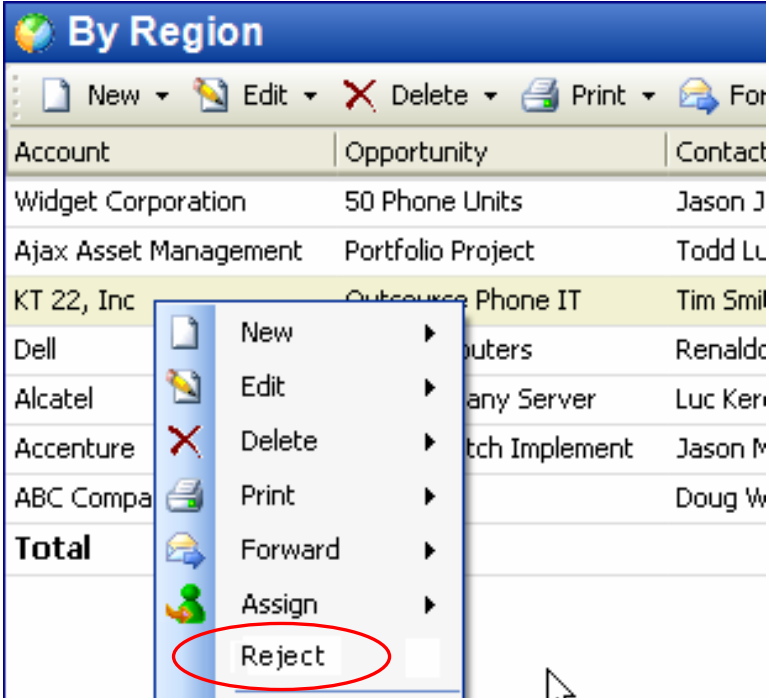
# Redesigned User Interface

- In context analytics
  - Integrated into screens and processes
  - Analytics toolbar on every view
- Opportunity details in tabs or scroll-mode
- Access:
  - Contacts & Organizations
  - Tasks & Outlook Calendar
  - Quotes & Attachments
  - Notes & Audit Log
  - Custom tabs and fields
  - Incidents & marketing activity



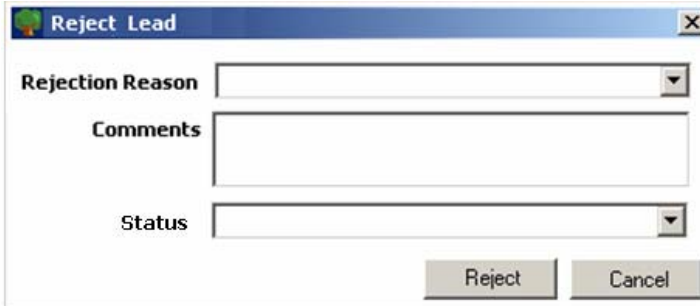
# Enhanced Lead Management

- New lead views keep opportunities and unqualified leads separate
- Reps can accept or reject leads
  - Accepting promotes a lead to an opportunity
  - Rejecting sends it back to the marketing warming pool
- New analytic lead reports show the effectiveness of lead generation activities and conversion rates



The screenshot shows a CRM interface with a table titled "By Region". The table has three columns: "Account", "Opportunity", and "Contact". The rows include "Widget Corporation", "Ajax Asset Management", "KT 22, Inc", "Dell", "Alcatel", "Accenture", "ABC Compa", and a "Total" row. A context menu is open over the "KT 22, Inc" row, listing actions: "New", "Edit", "Delete", "Print", "Forward", "Assign", and "Reject". The "Reject" option is circled in red.

| Account               | Opportunity         | Contact  |
|-----------------------|---------------------|----------|
| Widget Corporation    | 50 Phone Units      | Jason J  |
| Ajax Asset Management | Portfolio Project   | Todd Lu  |
| KT 22, Inc            | Outsources Phone IT | Tim Smil |
| Dell                  | Computers           | Renaldc  |
| Alcatel               | any Server          | Luc Ker  |
| Accenture             | atch Implement      | Jason M  |
| ABC Compa             |                     | Doug W   |
| <b>Total</b>          |                     |          |



The screenshot shows a "Reject Lead" dialog box with the following fields:

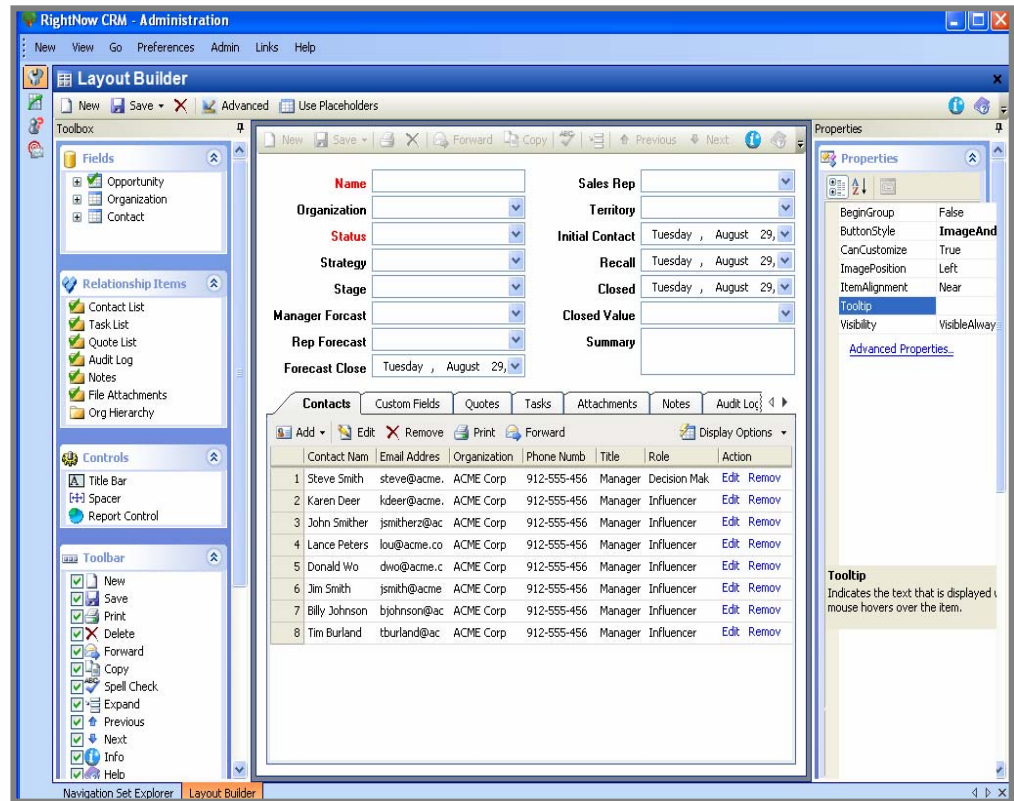
- Rejection Reason: [Dropdown menu]
- Comments: [Text area]
- Status: [Dropdown menu]

Buttons: "Reject" and "Cancel"

# Highly configurable Workspace Designer

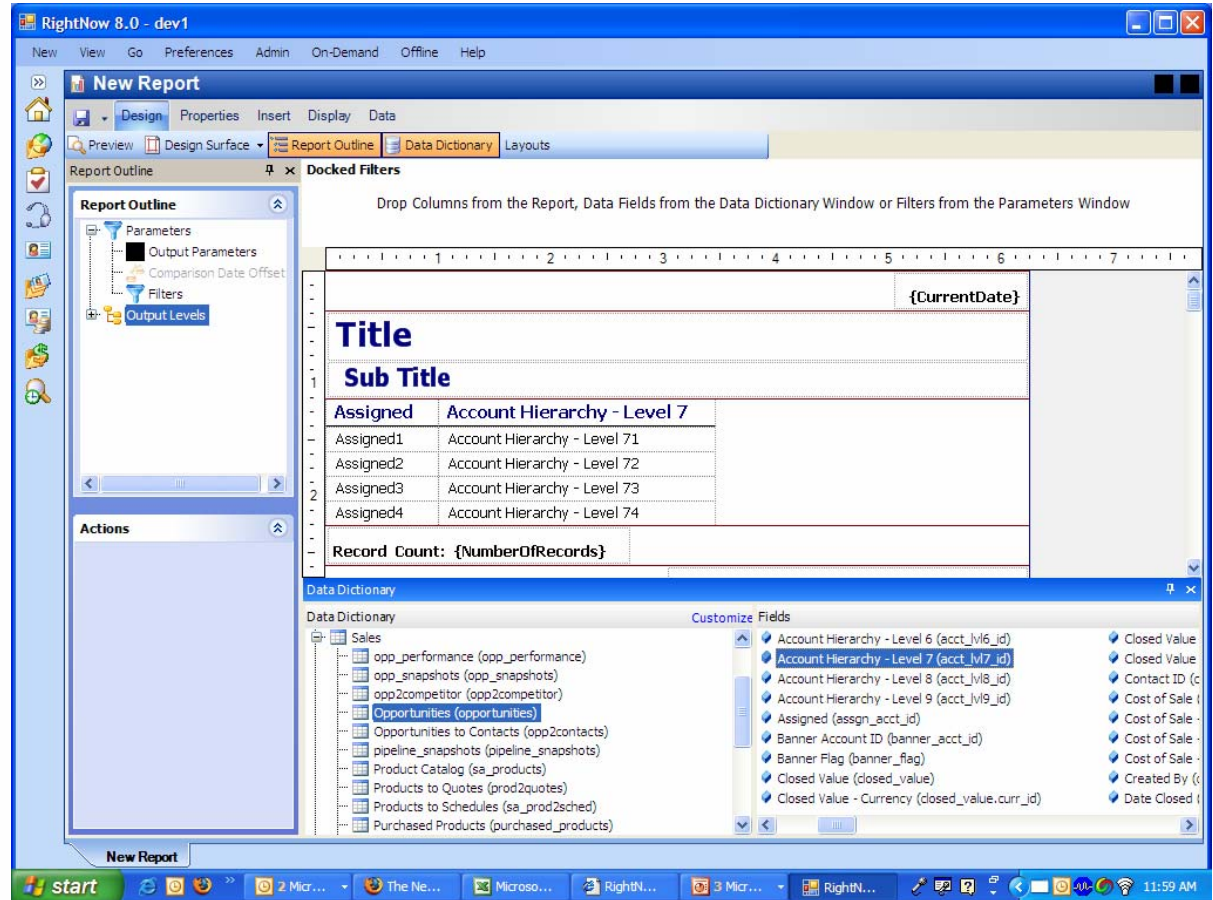
*what you need, when and where you need it...*

- Support role-based workflow
  - Sales rep, manager and execs
- Drag-and-drop screen layout customization
  - Fields
  - Tabs
  - Integrations
  - Toolbars
  - Analytics
  - Tasks



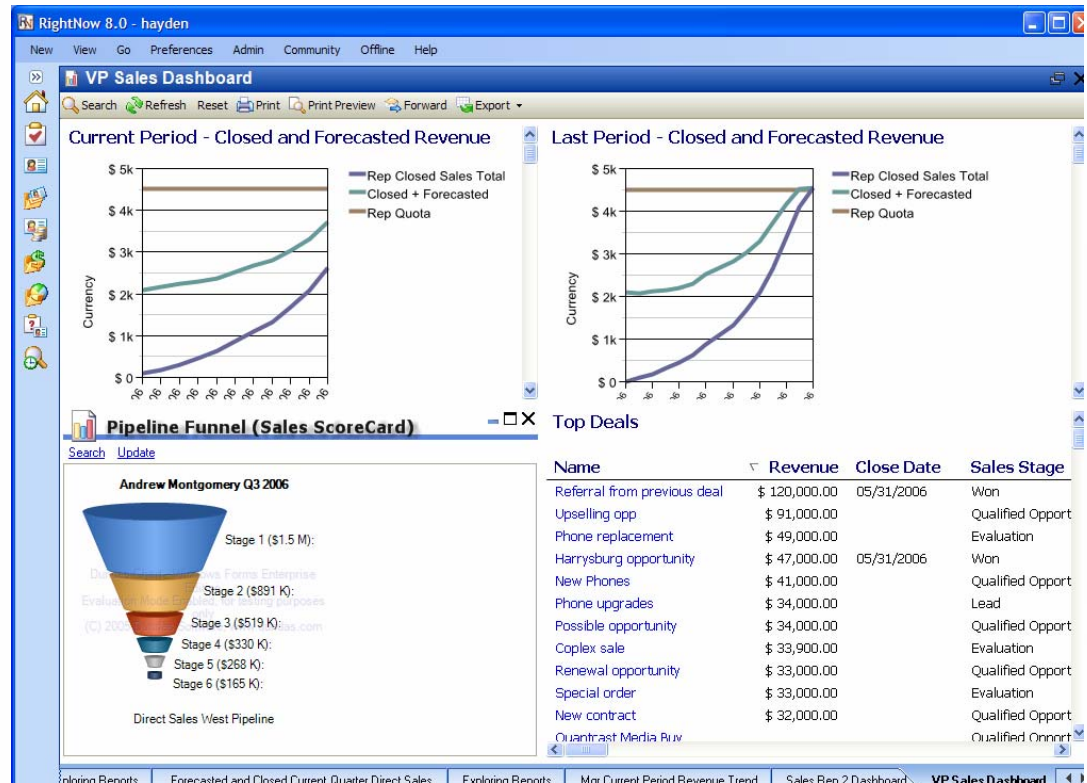
# Report Designer

- Drag and drop report creation
- Intuitive for the business user
- Powerful for advanced users



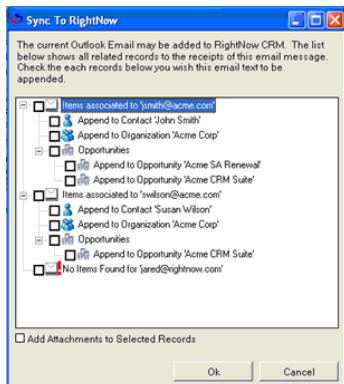
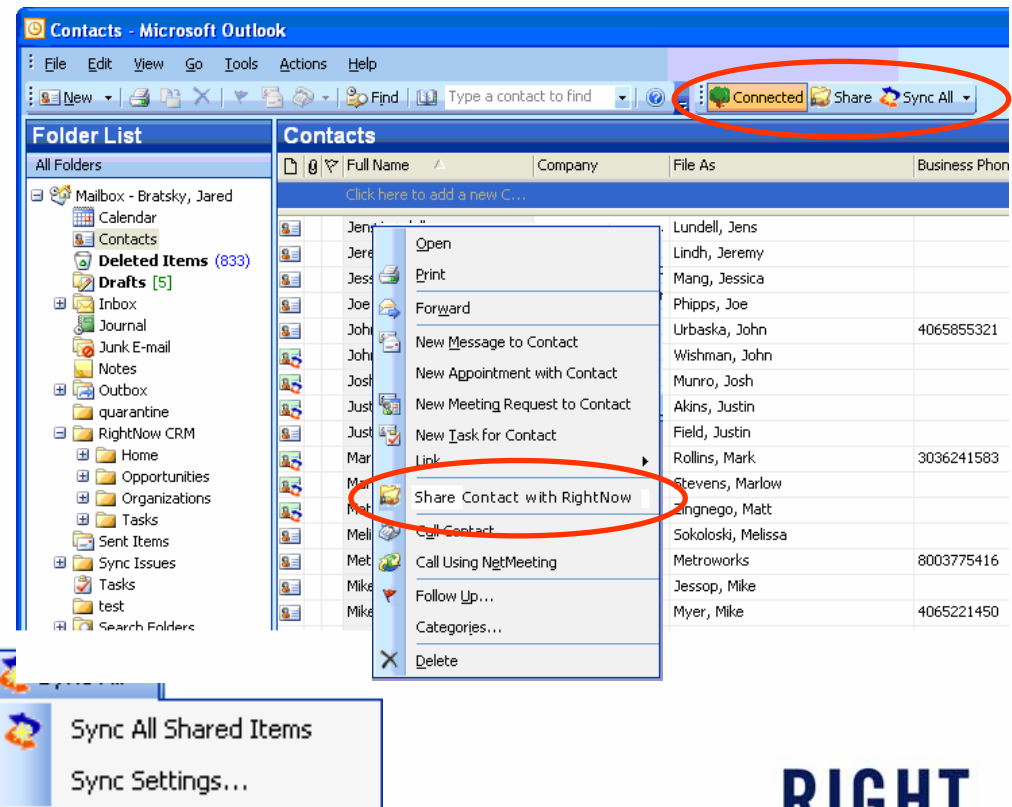
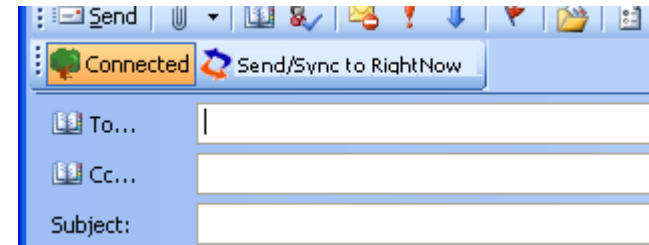
# Role-based dashboards and historical trending

- 50+ new best practice sales reports
- 20+ new role-based dashboards
- Daily and weekly data caching
- Powerful performance charting
  - Forecasted and closed revenue by week
  - Opportunity aging analysis
  - Won/lost deals by week
  - Monthly quota attainment



# Outlook Integration

- Seamless integration of Outlook and RightNow
- Access Outlook calendar and email within RightNow
- Sync contacts and tasks from Outlook



Questions?



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